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ABSTRACT

This document is part of a five-module training package to help employment and training service providers comply with the Workforce Investment Act (WIA) of 1998 and develop a one-stop training and employment services system. It consists of the participant workbook, trainer manual, and activity worksheets for a module on designing a system for the delivery of integrated services. The training manual presents a detailed lesson plan that includes step-by-step instructions for using the following tools and techniques to deliver the module: presenting overhead slides; having participants complete exercises; writing information on flip charts; using small group discussions; and using full group discussion. The workbook activities and worksheets are designed to achieve the following objectives: (1) help participants learn about different partnering models; (2) help participants identify opportunities for collaboration in the delivery of services to help customers find jobs; (3) teach participants six principles for redesigning one-stop services that can be applied to the tasks of

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reengineering customer flow, service delivery roles, and services offered to meet identified customer requirements; and (4) help participants learn to apply various tools (including brainstorming, consensus building, affinity diagrams, process mapping with process task spreadsheets and flow charting, and mind mapping) to service functions. (MN)

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Partnering for Quality under the Workforce Investment Act: A Tool Kit for One-Stop System Building

Module 4: Designing a System for the Delivery of Integrated Services

Trainer Manual with Participant Workbook

Deborah Kogan, Vinz Koller, Richalene Kozumplik, and Mary Ann Lawrence

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Partnering for Quality under the Workforce Investment Act:

A Tool Kit for One-Stop System Building

Trainer Manual

(with Participant Workbook)

July 1999

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Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 4

Designing a System for the Delivery of Integrated Services

Trainer Manual

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Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Designing an Integrated Services System.* This session is the fourth in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Partnering for Quality under WIA* includes:

- Module 1. Reviewing System-Building Progress and Developing a Blueprint for WIA Transition
- Module 2. Partnering and Organizational Change
- Module 3. Collecting and Using Customer Feedback
- Module 4. Designing a System for the Delivery of Integrated Services
- Module 5. Building a Process for Continuous Improvement

Each module has a series of companion products. In addition to this trainer manual, products developed for Module 4 on *Designing a System for the Delivery of Integrated Services* include overhead transparencies and a student workbook.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

> Sentences typed in ***bold italics*** are intended to be <u>said by the trainer to the group</u>.
>
> Sentences with a bullet in front of them are <u>action items</u> that the <u>trainer needs to do</u>.them are <u>action items</u> that the <u>trainer needs to do</u>.

Icons on the left hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

- Use overhead slide.

- Have participants complete exercise.

- Write information on flip chart.

- Use small group work/discussion.

- Use full group discussion.

- Write "Welcome" and your name and phone number on a flipchart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

WELCOME! Glad you can all be with us today.

Introduce yourself and give a brief description of your background and qualifications to lead this training module.

- Put on title overhead.

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Partnering for Quality Under the Workforce Investment Act:
A TOOL KIT FOR ONE-STOP SYSTEM BUILDING

Module 4
Designing a System for the Delivery of Integrated Services

- Ask individuals to say who they are, where they are from, and what they expect from the workshop. Write the answers on a flip chart. Hang the participant expectations on one wall to remind you of what should be covered.

- Put on overhead 4.2.

Workshop Objectives

- Recap different partnering models.
- Identify opportunities for collaboration to improve a typical function in a One-Stop.
- Reengineer the services offered by all partners in the selected function.
- Know how the same tools can be applied to additional service functions.

4-2

This session is intended to provide a refresher on partnering models ranging on a continuum from networking to collaborating. Participants will identify opportunities for collaboration and learn techniques to reengineer partnering services to address customer needs and expectations. Tools and techniques will be able to be applied to other service functions performed by diverse partners in a one-stop business.

- Put on overhead 4.3.

Principles for Redesigning One-Stop Services

◆ Principle #1. Think about services from a customer--rather than a program--perspective.

4-3

Let's take a look at six principles for redesigning one-stop services.

- Read overhead 4-3.

This principle brings the important element of "customer focus" into play. What might be some examples of looking at services from a PROGRAM perspective?

- Use full group discussion.

- Seek volunteers to provide examples. If no one volunteers suggest one or two ideas: 1) We need to fill a data entry class with dislocated workers; 2) Mr. Employer I do job development for older workers only – please place one!

- Put on overhead 4-4.

The Customer Perspective

- Stage 1. **Initial assessment**
  Who am I?
- Stage 2. **Career exploration**
  What options do I have?
- Stage 3. **Career decision-making**
  What career is best for me?
- Stage 4. **Career action plan**
  How do I get there?

4-4

When we begin looking at our business in terms of the "customer perspective" we might do so by thinking about these four steps:

- Read overhead 4-4.

- Put on overhead 4-5.

> Principles for Redesigning One-Stop Services
>
> - Principle #2. Let customers take responsibility for setting individual career goals and guiding the delivery of services.
> - Principle #3. Provide good information to support informed customer choice.
>
> 4-5

The new redesigned world will have customers taking responsibility for setting their own individual career goals. Customers will guide the delivery of services.

The third principle is to provide good information to support informed customer choice. This particular principle is a major shift in how we do business. We essentially are shifting from "giving people fish" to "teaching people how to fish". Our skills shift from telling people what to do to a coaching and mentoring role of providing as much good information as possible so that our customers can make INFORMED decisions.

- Put on overhead 4-6.

Principles for Redesigning One-Stop Services

- Principle #4. Offer differing levels of service intensity and staff supports to meet varying customer needs.
  - Encourage customers to use services independently when possible.
  - Offer staff support and access to more intensive services as needed.

4-6

- Read overhead 4-6.

This fourth principle reminds us that different levels of intensity will help us tailor our services and serve more with less!

- Put on overhead 4-7.

Principles for Redesigning One-Stop Services

- Principle #5. Encourage service specialization and diversity.
  - Universal services does not mean "one size fits all."
  - One-Stop systems often pool resources to support diverse service offerings that can be matched to individual customer needs and interests.

4-7

- Read overhead 4-7.

The concept of pooling resources can help you focus on customers by broadening the possibilities.

- Put on overhead 4.8.

> Principles for Redesigning One-Stop Services
>
> ◆ Principle #6. Ask customers what services they value and use customer feedback to improve service offerings over time.
>
> 4-8

Has it been a common practice to actually ASK customers what services they want and to actually use customer feedback to improve services? Probably not! We have from time to time done customer surveys. Can we honestly say we have used the information we get to change the way we do business?

- Put on overhead 4-9.

> Intended Results of Redesigned Services
>
> ◆ New customer and staff attitudes about the use of public workforce development services.
>
> ◆ Heightened expectations about service quality and relevance.
>
> ◆ Increased customer demand for services.
>
> 4-9

- Read overhead 4-9.

These intended results require a skills and knowledge in the area of process reengineering.

Let's take a look at the "homework" you brought with you today: information on customer requirements and standards for the function "help customers get jobs" from Module 3.

Ask each local team to spend some time reviewing the homework results and discussing. Indicate they will be reporting out on the homework after the discussion.

- Use small group work/discussion.

Ask each team to report out to the full group a recap of their homework findings.

- Use full group discussion.

Ask for comments and observations about from team to team.

Ask each team to review the six principles studied today and the intended results. Can they see any connection to their own customer requirements and standards?

- Use small group work/discussion.

Ask small groups to identify connections to full group for discussion.

- Use full group discussion.

- Put on overhead 4-10.

> **Process Reengineering**
>
> - Service reengineering tools are appropriate during a major change:
>   - New partners.
>   - New customers.
>   - New service needs or goals.
>   - Major breakdown in system effectiveness.
>
> 4-10

- Read overhead 4-10.

Service reengineering tools can help all the partners focus on customer needs and expectations and appropriate changes rather than on "turf" or program specific issues.

This is an important technique and will provide tools to assist your one-stop business in meeting the challenges of the new Workforce Investment Act.

- Put on overhead 4-11.

> **Workforce Investment Act Challenges**
>
> - New or enhanced partnerships.
> - New customers.
> - New service needs and goals.
> - New customer eligibility rules.
> - New customer flow principles.
> - New rules about how to prioritize or ration services among eligible customers.
>
> 4-11

- Read overhead 4-11. Discuss as appropriate.

- Put on overhead 4-12.

Workforce Investment Act Challenges
Continued

- New emphasis on post-placement support and services.
- New role for public system as training broker rather than training provider.

4-12

- Read overhead 4-12. Discuss as appropriate.

These Workforce Investment Act challenges...

- Put on overhead 4-13.

Universal access requires you create a system that comes up with multiple answers.

4-13

...provide us with an opportunity to create a system that comes up with multiple answers. Remember – ONE SIZE DOES NOT FIT ALL. We have to creatively learn to do more with less and deal with customer focused needs and expectations.

- Put on overhead 4-14.

Reengineering Team

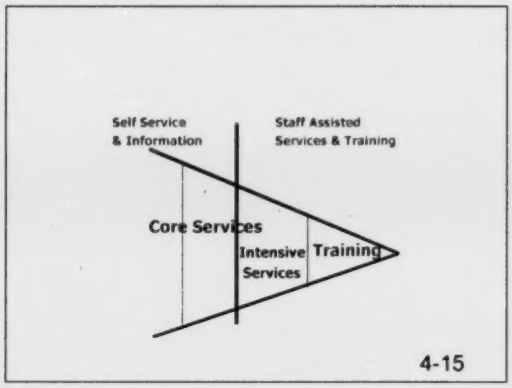
- "Internal" and "external" members.
  - Internal:
    - Individuals who work in the current process and bring knowledge and experience to the team.
  - External:
    - Individuals who know nothing about the existing process but can offer the creativity that flows from a fresh and objective perspective.

4-14

The individuals you pull together for a reengineering exercise should involve both internal and external members.

- Read overhead 4-14

- Put on overhead 4-15.



- Explain chart on overhead 4-15. Refer to Module 1 pages 1-10 through 1-13 for an explanation.
- Read overhead 4-15.

- Put on overhead 4-16.

WIA Requirements Related to Services

- Universal access to core services.
- A pyramid of services with three tiers.
  - Core.
  - Intensive.
  - Training.
- For adults under Title I, access to intensive services based on a demonstrated need, rather than categorical program eligibility.

4-16

- Read overhead 4-16.

If we look at the Workforce Investment Act requirements related to services, here are some of the points to consider.

- Put on overhead 4-17.

WIA Requirements Continued

- The development of new relationships between different entities in the local service delivery systems.
  - Workforce Investment Boards.
  - Contracted One-Stop center operators.
  - Core service providers within a One-Stop center.
  - Community based organizations providing contracted services for targeted populations.
  - Public and private training vendors.

4-17

- Read overhead 4-17

- Put on overhead 4-18.

WIA Requirements
Continued

- Mandated partners.
- A vision of the role of local Workforce Investment Boards as policy maker, administrator, and service broker, rather than program operator.
- Integrated case management.

4-18

- Read overhead 4-18

- Put on overhead 4-19.

Agree on a Shared Service Terminology

- Discuss the benefits of using a shared terminology.
- Identify areas of agreement and areas of disagreement on what terms should be used and how they should be defined. Use Activity Worksheet 4-A and 4-B.
- Report out on progress.

4-19

- Read overhead 4-19. Discuss as appropriate.

We discussed the development of a shared service terminology started in Module 2. Now that we have a better understanding of our partners we are ready to complete a list of service elements.

- Put on overhead 4-20.

Agree on a Shared Service Terminology, Continued

Activity Worksheets 4-A and 4-B

Compare your version of a common list of service elements to a suggested list for "Job Seekers Plus" and Employers.

4-20

This is another step that you will need to complete when your local team gets together at home, after you have completed your glossaries and your crosswalk of terms.

- Put on overhead 4-21.

Map Partner Services

- Use Activity Worksheet 4-C or 4-D.
- Complete the worksheet for services related to a particular function or family of services, e.g.,
  - Helping job seekers improve basic skills.
  - Helping individuals identify career interests and aptitudes.
  - Helping job seekers find jobs.
  - Helping employers screen job applicants,

4-21

In order to learn the techniques involved in mapping partner services, we are going to "borrow" a standardized shared service terminology developed by Mary Ann Lawrence to teach "service mapping" to local workforce development partners.

- Help attendees to find Activity Worksheets 4-C and 4-D.

- Say that these worksheets summarize a generic set of services that are likely to be provided by a number of local One-Stop partners.

- These sheets are designed to complete the first step of service mapping which is to summarize the services offered by each partner for each of the common service elements or service components.

- Refer attendees to Activity Worksheet 4-E, which summarizes the information about each service category across partners. This is a useful reference tool for planning how partners will work together to provide seamless services responsive to each customer need.

- Ask if there are any questions about how to use the service mapping worksheets.

Before you actually conduct a service mapping exercise for your local partnership, we strongly urge you to develop your own shared service terminology that all One-Stop partners have agreed that they can live with...

- Put on overhead 4-22.

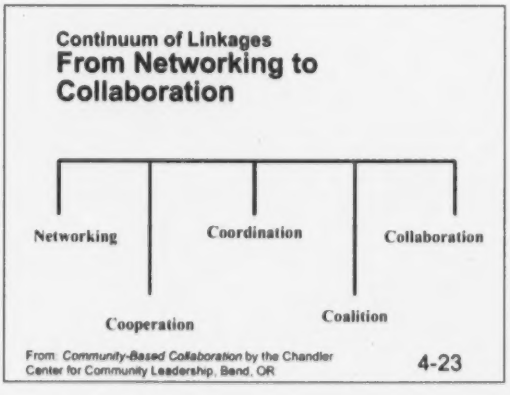
Crosswalk Services Across Partner Agencies

- Use Activity Worksheet 4-E or 4-F.
- Summarize the different agencies providing each type of service.
- Refer to Activity Worksheet 4-C and 4-D for details about the services provided by each agency.

4-22

- Explain the activity covered on slide 4-22.

- Put on overhead 4-23.



Let's take a few quick minutes to review information on partnering models that you learned in Module 1. Remember from Module 1 that partnering can be different based on the project or need at hand.

Please take a look at the next 5 slides on pages 4-8 and 4-9 of your workbook to review the different partnering types on the continuum.

- Put on overhead 4-24.

Networking

Purpose	*Structure*	*Process*
• Dialogue and common understanding. • Information clearinghouse. • Create base of support.	• Non-hierarchical. • Loose/flexible links. • Roles loosely defined. • Communication is primary link among members.	• Low key leadership. • Minimal decision making. • Little conflict. • Informal communication.

4-24

- Read the "Purpose" section on overhead 4-24

- Put on overhead 4.25.

Cooperation or Alliance

Purpose	*Structure*	*Process*
• Match needs and provide coordination. • Limit duplication of services. • Ensure tasks are done.	• Central body of people as communication hub. • Semi-formal links. • Roles somewhat defined. • Links are advisory. • Little or no new financial resources.	• Facilitative leaders. • Complex decisionmaking. • Some conflict. • Formal communication within the central group.

4-25

- Read the "Purpose" section on overhead 4-25

- Put on overhead 4.26.

Coordination or Partnership

Purpose	*Structure*	*Process*
• Share resources to address common issues. • Merge resource base to create something new.	• Central body of people consists of decision makers. • Roles defined. • Links formalized. • Group leverages/ raises money.	• Autonomous leadership but focus is on issue. • Group decision making in central and subgroups. • Communication is frequent and clear.

4-26

- Read the "purpose" section on overhead 4-26.

- Put on overhead 4.27.

Coalition

Purpose	*Structure*	*Process*
• Share ideas and be willing to pull resources from existing systems. • Develop commitment for a minimum of three years.	• All members involved in decision making. • Roles and time defined. • Links formal with written agreement. • Group develops new resources and joint budget.	• Shared leadership. • Decision making formal with all members. • Communication is common and prioritized.

4-27

- Read the "purpose" section on overhead 4-27.

- Put on overhead 4.28.

Collaboration

Purpose	*Structure*	*Process*
• Achieve a shared vision. • Build interdependent system to address issues.	• Shared decision making. • Consensus used. • Roles defined. • Links are formal. • Resources and joint budgets are developed.	• High trust. • Ideas and decisions are equally shared. • Communication system is highly developed.

4-28

- Read the "Purpose" section on overhead 4-28.

The reengineering process can develop and enhance partnerships that lead to good effective collaboration.

- Put on overhead 4.29.

Reengineering

- The fundamental rethinking and radical redesign of business processes to bring about dramatic improvements in performance.
- Rethinking work from the ground up in order to eliminate work that is not necessary and to find better ways of doing work that is.
- Customer focused and customer driven rather than program driven.

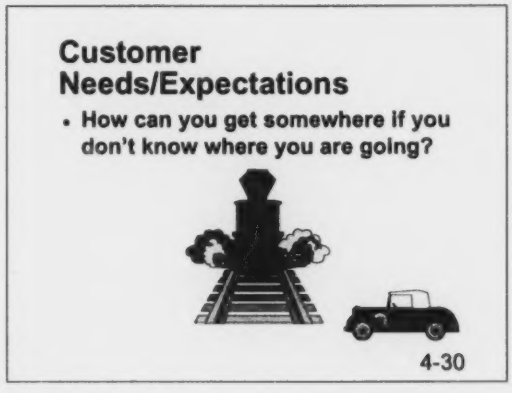
4-29

What is reengineering?

- Use full group discussion.

- Ask for someone to read the bullet points. Facilitate discussion on what this all means related to the job.

- Put on overhead 4.30.



- Discuss Purpose of slide 4-30.

- Put on overhead 4-31.

Process

- A group of related tasks that together create value for a customer.
  - Example: Help customers get jobs.
    - List action steps that culminate in customers getting jobs.
- These action steps are of no meaning to the customer - he/she only cares about end result.

4-31

What is a process?

- Use full group discussion.
- Ask for someone to read the bullet points. Facilitate discussion on what this all means related to customers needing jobs.

- Put on overhead 4-32.

Planning for Reengineering

1. Identify collaboration opportunities.
   - Establish "who" the customer groups are.
   - Review current partners' products and services that are relevant to this function.
   - Know customer needs and expectations.
   - Identify collaboration strategies that will meet partner agencies' needs and improve outcomes for customers.

4-32

We are going to take a look at five steps involved in reengineering. The first being.....

- Read overhead 4-32.

- Put on overhead 4-33.

Planning for Reengineering
Continued

2. Identify ideas on what you and your partners want the reengineered process to do.
3. Review the current process.
4. Sketch new process alternatives.
5. Establish consensus on new process

4-33

- Read overhead 4-33.

We will walk you through these 5 steps using a case example of the function "helping customers to get jobs."

- Put on overhead 4-34.

Planning for Reengineering

Case Example:

Function: **Orient potential customers to available services.**

4-34

- Put on overhead 4.35.

Identifying Collaboration Opportunities

- Review homework.
  - Who is the customer related to this function?

4-35

Ask participants to once again pull out the information from their homework on "Who the Customer Is" related to the function of helping customers to get jobs.

- Use small group work/discussion.

- Use full group discussion.

- Ask for volunteers to present information to full group. Facilitate a brief discussion of WHO the customer is.

- Ask each individual team to print in big letters each of the customers they identified on 8½ x 11 sheets of paper (one customer per page). Trainer Note: Examples: job seekers plus, employers, or dislocated workers, disadvantage adults, disadvantaged youth, older workers.

- Put on overhead 4-36.

Identifying Collaboration Opportunities
Continued

- Review information.
  - Current partners' products and services that are relevant to this function.
  - List one per card on cards color-coded for partner.
- Do affinity diagram to identify common products and services.

4-36

- Ask each individual team to review the homework that provided information on current partners' products and services that are relevant to helping customers to find jobs.

- Have participants complete exercise.

- Ask each individual team to list EACH PARTNER PRODUCT AND SERVICE (ONE PER CARD) on color-coded cards. Each partner should have a different color. Index cards or half sheets of colored paper will work fine. If possible use post-it notes.

- Hang each of the large 8½ x 11 customer cards on the wall. Have partner put their individual color-coded cards listing

products and services on the wall under the appropriate customer heading.

- Have the individual teams do an AFFINITY DIAGRAM with the cards on the wall. See AFFINITY DIAGRAM directions in Resource Tool Kit to explain process.
- Leave information on wall. Trainer Note: Sometimes post-it notes will not stick to a particular wall surface. Please reinforce any that don't seem to stick with masking tape.

- Put on overhead 4-37.

Identifying Collaboration Opportunities
Continued

- Review information.
  - Customer needs and expectations related to this function.
  - List one per card on cards color-coded for partner.
- Do affinity diagram to identify common customer needs and expectations.

4-37

- Ask each individual team to review the homework that provided information on customer needs and expectations that are relevant to helping customers to find jobs.

- Have participants complete exercise.
- Ask each individual team to list EACH CUSTOMER NEED AND EXPECTATION (ONE PER CARD). These are cumulative so it is not necessary to show individual partnering color-codes
- Make a second set of customer headings as used in previous exercise hang each of the large 8½ x 11 customer cards on the

wall. You may want to have a heading that says "ALL JOB SEEKER CUSTOMERS" for needs and expectations that cut across customer groups.

- Put up each card on the wall under the appropriate customer heading.
- Have the individual teams do an AFFINITY DIAGRAM with the cards on the wall. See AFFINITY DIAGRAM directions in Resource Tool Kit to explain process.
- Leave information on wall. Trainer Note: Sometimes post-it notes will not stick to a particular wall surface. Please reinforce any that don't seem to stick with masking tape.
- Ask someone to be responsible for numbering the information on the wall so they can take it home and type it up. Groups can be lettered A...B...C...etc, with the cards in the groupings numbered A1...A2...A3...etc, or B1...B2...etc.

- Put on overhead 4-38.

Identifying Collaboration Opportunities
Continued

- Products/services and customer needs/expectations that have multiple funding source implications are potential areas for collaboration.
- Identify collaboration strategies that will meet partner agencies' needs and improve outcomes for customers.
  - A strategy is a statement to meet a need or overcome a challenge.

4-38

As indicated on overheard 4-38, products and services and customer needs and expectations that have multiple funding source implications are potential areas for collaboration. It is much easier to start with what you have in common and grow from there.

- Use small group work/discussion.
- Ask group to brainstorm needs and challenges related to products and services and customer needs and expectations.
- Go over the BRAINSTORMING TECHNIQUE technique outlined in the Resource Tool Kit.

- Write information on flip chart.
- The brainstormed items should be listed on flipchart pages and hung on the wall for each individual team.

- Have participants complete exercise.
- Ask each individual team member to vote on the 5 to 10 needs and challenges they as individuals feel are most immediate to address customer needs and expectations. Refer to the DOT VOTING METHOD outlined in the Resource Tool Kit. Team members vote only on those identified by their own individual team.

- Use small group work/discussion.
- Ask each group to discuss the needs and challenges that got the most votes. Then, have them identify strategies to meet the need or overcome the challenge on each of the priorities. Encourage a number of strategies for each priority so that it is recognized that there are many ways to partner and solve the issue of needs and challenges.

- Write information on flip chart.

- Read the second bullet on the overhead 4-38.

- Put on overhead 4-39.

Identify What Process Will Do

- Review the list of potential strategies and brainstorm what you and your partners want the reengineered process to do.

4-39

- Read overhead 4-39.

- Use small group work/discussion.
- Ask individual teams to spend time discussing the potential strategies and what they all want the reengineered processes to do to address the customer needs and expectations outlined in the strategies. A team member should be taking notes on this discussion.

- Use full group discussion.
- Ask each individual team to provide and overview of what they discussed related to processes to the full group. Facilitate discussion as needed.

- Put on overhead 4-40.

Review the Current Process

- Take a look at the current process each individual partner uses to "orient potential customers to services available" to help show the "as is" capability.
- Conduct a process mapping exercise for this function.
  - See "Process Mapping" in the tools section of this module.

4-40

What we want to do now is to look at the process each of partners are currently using to "help customers to get jobs" The individual 'partner' teams for your local area conduct a process mapping exercise for this function. A description of PROCESS MAPPING is provided in the resource Resource Tool Kit. For our purposes today, I will walk you through each step so you can experience it first hand.

- Put on overhead 4-41.

- List the major process steps in a spreadsheet format.
- List subtasks or decisions needed for each of the major steps.
- Ask team members questions along the way to help capture necessary steps.
  - *What really happens next?*
  - *Is there a decision needed before or after this task?*
  - *Are there approvals needed before or after this task?*
  - *Are we missing anything?*

4-41

The first part of looking at your current process is to...

- Read overhead 4-41.

You can see a sample of a Process Task Spreadsheet that lists the major process steps and subtasks or decisions on overhead 4-42.

- Put on overhead 4-42.

Process Task Spreadsheet

Task #	Major Process Tasks	Subtasks/Decisions	Symbols
1	Staff gets inquiry from potential customer		
2		By phone?	
3		Staff gives next step directions to individual	
4		In person?	
5		Staff provides information on services to individual	
6	Customer reviews information		

4-42

Take some time now to list all of your individual steps you go through in helping customers to get jobs.

- Have participants complete exercise.

If you get stuck, look at the questions on overhead 4-41. What really happens next? Is there a decision needed before or after this task? Are there approvals needed before or after this task? Are we missing anything.

- Use small group work/discussion.
- Once each "partner team" finishes their list of current process items, have each partner team go over their list Process Task Spreadsheet with the full local team. They should discuss each other's process.

- Put on overhead 4-43.

Review the Current Process
Continued

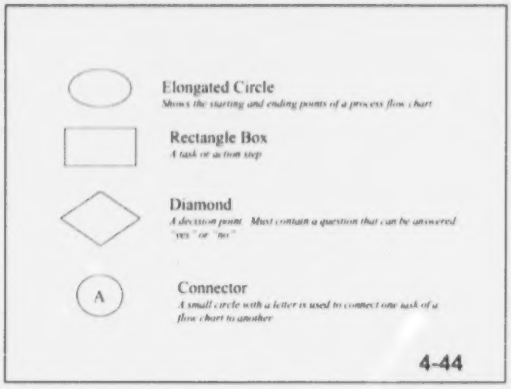
- Look at each line in the Process Task Spreadsheet and determine which flow chart symbol it would use.

4-43

- Ask each "partner team" to identify the appropriate system for each of the items listed on the Process task Spreadsheet. Refer participants to overheads 4-44 - 4-45 for symbol information. Quickly review them with the participants.

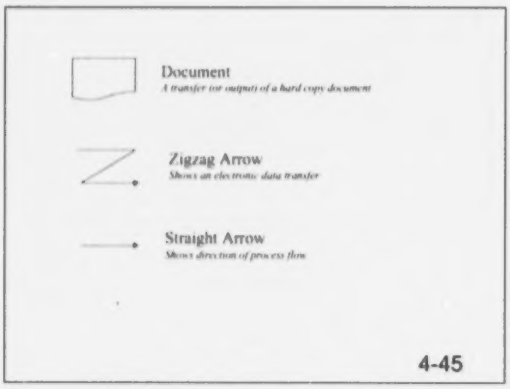
- Use small group work/discussion.
- Have local teams discuss reengineering needs based on customer feedback.

- Put on overhead 4.44.


Elongated Circle
Shows the starting and ending points of a process flow chart
Rectangle Box
A task or action step
Diamond
A decision point. Must contain a question that can be answered "yes" or "no"
A
Connector
A small circle with a letter is used to connect one task of a flow chart to another
4-44

- Go over overhead 4-44

- Put on overhead 4-45.



- Go over overhead 4-45

You will note in overhead 4-46 a sample of what your finished Process Task Spreadsheet will look like after you have identified the appropriate systems.

- Put on overhead 4-46.

Process Task Spreadsheet

Task #	Major Process Tasks	Subtasks/Decisions	Symbols
1	Staff gets inquiry from potential customer		▭
2		By phone?	◇
3		Staff gives next step directions to individual	▭
4		In person?	◇
5		Staff provides information on services to individual	▭
6	Customer reviews information		▭

4-46

- Use small group work/discussion.

- Give individual partner teams a chance to write in symbols on their Process Task Spreadsheet. Then ask them to draw the flowchart using the symbols discussed.

- Put on overhead 4-47.

Review the Current Process
Continued

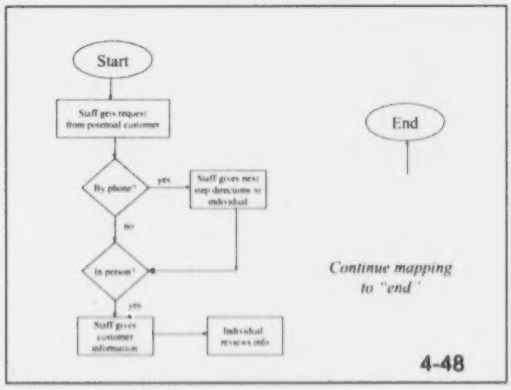
- Create a process flow chart to visually see what you listed in the process task spreadsheet.

4-47

- Write information on flip chart.

- Ask each partner team to draw their process flow chart for helping customers find jobs on a flip chart sheet.

- Put on overhead 4-48.



- Leave this overhead up as they are flowcharting for easy reference on the look.

- Use small group work/discussion.

- Ask local teams to review and discuss each partner team's flowchart for helping customers find jobs. What is similar among them? What is different? Are the differences significant? What are the reasons for the differences

- Put on overhead 4.49.

Review the Current Process
Continued

- Review the final "current process flow chart".
- With multi-partners doing independent work you will likely have several separate flow charts that may or may not intersect based on your current coordination or linkages.
- Discuss reengineering needs based on customer feedback. 4-49

- Read overhead 4.49.

- Use small group work/discussion.
- Have local teams discuss reengineering needs based on customer feedback.

- Put on overhead 4.50.

Sketch New Process Alternatives

- Envision a desired state.
- If you could establish a process that would meet partner agencies' needs and improve customer outcomes, what would that look like?
- Forget current process now. Focus on what a new process might look like and what it could accomplish.

4-50

Now let's forget the current process and begin thinking about how the process would work in a "perfect world".

- Read overhead 4-50.

- Use small group work/discussion.
- Have local teams brainstorm and map out what the process would look like if they worked together to meet customer needs and expectations. This involves "merging" steps where possible and streamlining or eliminating customer hoops.

- Write information on flip chart.
- Ask local teams to record the new process flowchart for helping customers find jobs on a flipchart.

- Use full group discussion.
- Have local teams report to the full group on their NEW AND IMPROVED process. Facilitate discussion as needed.
- Now, before you can move on it is important to know that each partner agrees with the new process flowchart.

- Put on overhead 4.51.

Establish Consensus on New Process

- Review reengineered process(es) and agree by consensus to move forward with ideas.

4-51

- Your local teams need to establish consensus.

- Refer participants to the CONSENSUS technique outlined in the Resource Tool Kit. Explain to participants how to reach consensus based on the described technique.

The Process Flowchart you have completed shows a comprehensive flow from beginning to end of the function involved. Customers are not a part of the majority of steps in your process flowchart. A great number of the steps are likely staff related tasks and decision or question points.

- Put on overhead 4.52.

Redesign Customer Flow

- Based on new process flow chart(s), review customer flow.
- This redesign flow chart(s) will show only steps customers themselves must take to get to the desired outcome.

4-52

Now, do another Process Flowchart that only shows the steps customers themselves must take to get to the desired outcome.

- Use small group work/discussion.

- Have local teams discuss the steps involved in the merged flowchart and which of the steps are directly customer related.

- Write information on flip chart.

- Ask local teams to record the "customer flowchart" on a flipchart page(s) and hang on the wall for review by all the local teams.

- Use full group discussion.

- Have local teams report out on their customer flowchart to the full group. Facilitate discussion as needed. *Trainer note: if time is short, have only one or two groups report out*

- Put on overhead 4-53.

Service Delivery Roles

- Review process flowchart.
- Review redesigned customer flow.
- Present to partners for review.

4-53

Review the merged Process Flowchart. Review the redesigned customer flow based on the customer needs and expectations. Present these two flowcharts to all of your partners who are not here today. Validate the information with them and establish consensus on piloting the new process flow.

Here are some examples of reengineering job placement/job search activities.

- Put on overhead 4-54.

Example of Reengineering Job Placement/Job Search

- Pewaukee, Wisconsin. Increase automated self-service options when little value added by staffed service.
  - *Old System* - ES staff took suppressed job orders from employers, used an automated job matching program, and referred job seekers registered with ES to employers.
  - *New System* - Automated job listings are directly accessible by job seeker customers. Staff are freed to provide more intensive services like counseling hard-to-place customers and offering employers individualized placement services (e.g. customized recruitment and screening).

4-54

- Read overhead 4-54

- Put on overhead 4-55.

Example of Reengineering Job Placement/Job Search

- Blaine, Minnesota. Improve the quality of job matching services by linking to information from local customer assessments.
  - *Old System* - Minnesota SkillsNet system is a statewide automated job information systems that can help One-Stop staff match the characteristics of current job seekers to the characteristics required in current job listings.
  - *New System* - In the Minnesota Workforce Center - Anoka County, a client assessment database shared by the center and vocational and technical colleges helps provide information on job seekers as input to the matching process.

4-55

- Read overhead 4-55.

- Put on overhead 4-56.

Examples of Reengineering Job Placement/Job Search

- Baltimore, Maryland. Design a consistent approach to job placement services using a local interagency job placement design team
- Des Moines, Iowa. Consolidate the job placement function using a One-Stop job placement services team with staff from multiple partner agencies.
- Springfield, Massachusetts. Offer diverse job search workshops targeted to the needs of different customer groups: hourly and salaried workers.

4-56

- Read overhead 4-56.

- Put on overhead 4-57.

Examples of Reengineering Job Placement/Job Search

- Provide job search training on an "as needed" basis through modular workshops.
- Offer a staffed job club as a core One-Stop service available to all customers.
- Offer staffed job search support services to all customers who are having difficulty finding a job.

4-57

- Read overhead 4-57.

- Put on overhead 4.58.

General Principles for Reengineered Job Placement/Job Search

- Increase customer choices by offering diverse services targeted to customers with differing education and work experience, using different delivery modes and a number of short modules.
- Take advantage of automated tools where effective.

4-58

- Read overhead 4-58.

- Put on overhead 4-59.

General Principles
Continued

- Figure out how to supplement automated services to help customers who need more assistance with staffed and individualized supports.
- Encourage customer initiative.
- Figure out where the customer is in the career development process and tailor service entry point to their needs.

4-59

- Read overhead 4-59.

- Put on overhead 4-60

General Principles
Continued

- Address both job seeker and employer customer needs.
- Build on the service capacity, staff expertise, and strength of current partners.
- Seek new partners or new funding streams to fill gaps.
- Add to richness and diversity of service options.

4-60

- Read overhead 4-60

- Put on overhead 4-61

Using the Tools

- There are many functions that can be addressed in a unified way either through consolidation of functions, cross-staffing, and pooled funding; or through specialization in the service functions provided by different program partners and funding streams.

4-61

- Read overhead 4-61.

It is usually more effective to start with areas you have in common to form or enhance partnerships.

- Put on overhead 4-62

Using the Tools

- Apply the same tools to additional service functions.
  - Up-front services (eligibility, assessment, referral).
  - Post-placement training.
  - Career ladder/enhancing employment.
  - Automated information services.

4-62

- Read overhead 4-62.

Here are some examples of other functions you might want to work at in regard to process mapping like we've done today with helping customers find jobs.

- Put on overhead 4-63

Using the Tools
Continued

- Resource information areas.
- Group workshops.
- Staff support for customers needing assistance with self-service tools.
- Job information centers.

4-63

- Read overhead 4-63.

Now let's take a look at homework to prepare you for Module 5.

- Put on overhead 4-64

Homework Assignments

4-64

Please jot this information down or remember where to find it.

- Put on overhead 4-65

Assignment 1.

- Review information you created in this session to complete Process Task Spreadsheet(s) for "helping customers to get jobs."
- Validate the information and make changes as necessary.
- Do revised Process Flow Chart(s) based on revised Process Task Spreadsheet(s).

4-65

- Read overhead 4-65
- Have participants complete exercise

- Have participants complete exercise.
- Ask participants to complete a course evaluation form.

- Put on overhead 4-66

Assignment 2.

- Review information you created in this session to sketch new process alternatives for "helping customers to get jobs."
- Validate the information and make changes as necessary.
- Do a revised Process Task Spreadsheet for validated sketches.
- Do a revised Process Flow Chart based on revised Process Task Spreadsheet.

4-66

- Put on overhead 4-67

A Resource Guide for TOOLS

4-67

- Put on overhead 4-68

TOOLS - Resource Guide

- Brainstorming.
- Consensus.
- Affinity Diagram.
- Process Mapping.
  - Process Task Spreadsheet.
  - Flow Charting.
- Mind Mapping.

4-68

- Ask participants to complete a course evaluation form.

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act: A Tool Kit for One-Stop System Building

Module 4

Designing a System for the Delivery of Integrated Services

Participant Workbook

200 Middlefield Road, Suite 100
Menlo Park, CA 94025
Phone (650) 617-8625/Fax (650) 617-8630

CE082600

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality Under the Workforce Investment Act:
A TOOL KIT FOR ONE-STOP SYSTEM BUILDING

Module 4
Designing a System for the Delivery of Integrated Services

Workshop Objectives

- Recap different partnering models.
- Identify opportunities for collaboration to improve a typical function in a One-Stop.
- Reengineer the services offered by all partners in the selected function.
- Know how the same tools can be applied to additional service functions.

4-2

Principles for Redesigning One-Stop Services

- Principle #1. Think about services from a customer, rather than a program, perspective.

4-3

The Customer Perspective

- Stage 1. **Initial assessment**
  Who am I?
- Stage 2. **Career exploration**
  What options do I have?
- Stage 3. **Career decision-making**
  What career is best for me?
- Stage 4. **Career action plan**
  How do I get there?

4-4

Principles for Redesigning One-Stop Services

- Principle #2. Let customers take responsibility for setting individual career goals and guiding the delivery of services.
- Principle #3. Provide good information to support informed customer choice.

4-5

Principles for Redesigning One-Stop Services

- Principle #4. Offer differing levels of service intensity and staff supports to meet varying customer needs.
  - Encourage customers to use services independently when possible.
  - Offer staff support and access to more intensive services as needed.

4-6

Principles for Redesigning One-Stop Services

- Principle #5. Encourage service specialization and diversity.
  - Universal services does not mean "one size fits all."
  - One-Stop systems often pool resources to support diverse service offerings that can be matched to individual customer needs and interests.

4-7

Principles for Redesigning One-Stop Services

- Principle #6. Ask customers what services they value and use customer feedback to improve service offerings over time.

4-8

Intended Results of Redesigned Services

- New customer and staff attitudes about the use of public workforce development services.
- Heightened expectations about service quality and relevance.
- Increased customer demand for services.

4-9

Process Reengineering

- Service reengineering tools are appropriate during a major change:
  - New partners.
  - New customers.
  - New service needs or goals.
  - Major breakdown in system effectiveness.

4-10

Workforce Investment Act Challenges

- New or enhanced partnerships.
- New customers.
- New service needs and goals.
- New customer eligibility rules.
- New customer flow principles.
- New rules about how to prioritize or ration services among eligible customers.

4-11

Workforce Investment Act Challenges
Continued

- New emphasis on post-placement support and services.
- New role for public system as training broker rather than training provider.

4-12

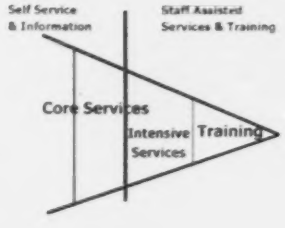
Universal access requires the creation of a system that comes up with multiple answers.

4-13

Reengineering Team

- "Internal" and "external" members.
  - Internal:
    - Individuals who work in the current process and bring knowledge and experience to the team.
  - External:
    - Individuals who know nothing about the existing process but can offer the creativity that flows from a fresh and objective perspective.

4-14



4-15

WIA Requirements Related to Services

- Universal access to core services.
- A pyramid of services with three tiers.
  - Core.
  - Intensive.
  - Training.
- For adults under Title I, access to intensive services based on a demonstrated need, rather than categorical program eligibility.

4-16

WIA Requirements Continued

- The development of new relationships between different entities in the local service delivery systems.
  - Workforce Investment Boards.
  - Contracted One-Stop center operators.
  - Core service providers within a One-Stop center.
  - Community based organizations providing contracted services for targeted populations.
  - Public and private training vendors.

4-17

WIA Requirements Continued

- Mandated partners.
- A vision of the role of local Workforce Investment Boards as policy maker, administrator, and service broker, rather than program operator.
- Integrated case management.

4-18

Agree on a Shared Service Terminology

- Discuss the benefits of using a shared terminology.
- Identify areas of agreement and areas of disagreement on what terms should be used and how they should be defined. Use Activity Worksheet 4-A and 4-B.
- Report out on progress.

4-19

Agree on a Shared Service Terminology, Continued

Activity Worksheets 4-A and 4-B

Compare your version of a common list of service elements to a suggested list for "Job Seekers Plus" and Employers.

4-20

Map Partner Services

- Use Activity Worksheet 4-C or 4-D.
- Complete the worksheet for services related to a particular function or family of services, e.g.,
  - Helping job seekers improve basic skills.
  - Helping individuals identify career interests and aptitudes.
  - Helping job seekers find jobs.
  - Helping employers screen job applicants.

4-21

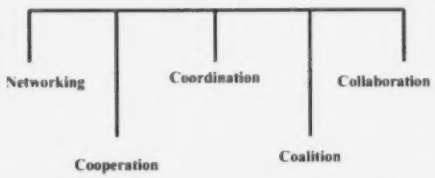
Crosswalk Services Across Partner Agencies

- Use Activity Worksheet 4-E or 4-F.
- Summarize the different agencies providing each type of service.
- Refer to Activity Worksheet 4-C and 4-D for details about the services provided by each agency.

4-22

Continuum of Linkages

From Networking to Collaboration



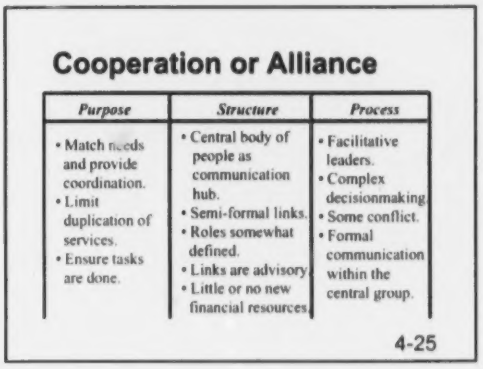
From: *Community-Based Collaboration* by the Chandler Center for Community Leadership, Bend, OR

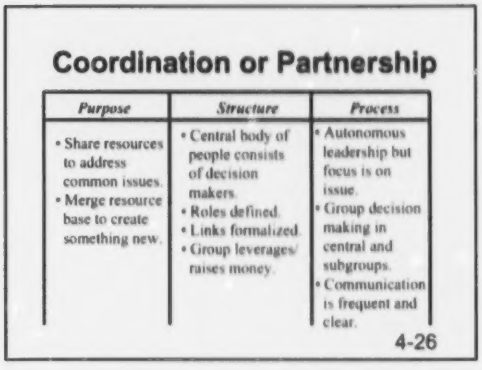
4-23

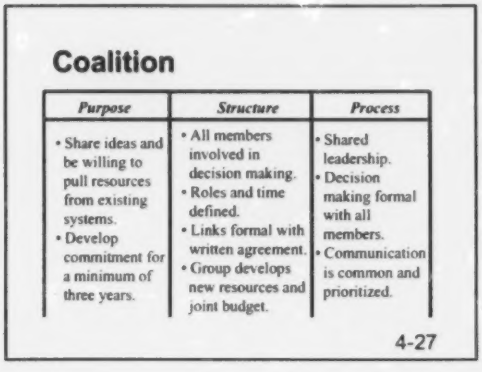
Networking

Purpose	*Structure*	*Process*
• Dialogue and common understanding. • Information clearinghouse. • Create base of support.	• Non-hierarchical. • Loose/flexible links. • Roles loosely defined. • Communication is primary link among members.	• Low key leadership. • Minimal decision making. • Little conflict. • Informal communication.

4-24


Cooperation or Alliance
Purpose
• Match needs and provide coordination.
• Limit duplication of services.
• Ensure tasks are done.
Structure
• Central body of people as communication hub.
• Semi-formal links.
• Roles somewhat defined.
• Links are advisory.
• Little or no new financial resources.
Process
• Facilitative leaders.
• Complex decisionmaking.
• Some conflict.
• Formal communication within the central group.
4-25


Coordination or Partnership
Purpose
• Share resources to address common issues.
• Merge resource base to create something new.
Structure
• Central body of people consists of decision makers.
• Roles defined.
• Links formalized.
• Group leverages/ raises money.
Process
• Autonomous leadership but focus is on issue.
• Group decision making in central and subgroups.
• Communication is frequent and clear.
4-26


Coalition
Purpose
• Share ideas and be willing to pull resources from existing systems.
• Develop commitment for a minimum of three years.
Structure
• All members involved in decision making.
• Roles and time defined.
• Links formal with written agreement.
• Group develops new resources and joint budget.
Process
• Shared leadership.
• Decision making formal with all members.
• Communication is common and prioritized.
4-27

Collaboration

Purpose	*Structure*	*Process*
• Achieve a shared vision. • Build interdependent system to address issues.	• Shared decision making. • Consensus used. • Roles defined. • Links are formal. • Resources and joint budgets are developed.	• High trust. • Ideas and decisions are equally shared. • Communication system is highly developed.

4-28

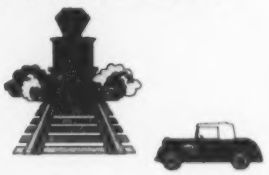
Reengineering

- The fundamental rethinking and radical redesign of business processes to bring about dramatic improvements in performance.
- Rethinking work from the ground up in order to eliminate work that is not necessary and to find better ways of doing work that is.
- Customer focused and customer driven rather than program driven.

4-29

Customer Needs/Expectations

- **How can you get somewhere if you don't know where you are going?**



4-30

Process

- A group of related tasks that together create value for a customer.
  - Example: Help customers get jobs.
    - List action steps that culminate in customers getting jobs.
- These action steps are of no meaning to the customer - he/she only cares about end result.

4-31

Planning for Reengineering

1. Identify collaboration opportunities.
   - Establish "who" the customer groups are.
   - Review current partners' products and services that are relevant to this function.
   - Know customer needs and expectations.
   - Identify collaboration strategies that will meet partner agencies' needs and improve outcomes for customers.

4-32

Planning for Reengineering
Continued

2. Identify ideas on what you and your partners want the reengineered process to do.
3. Review the current process.
4. Sketch new process alternatives.
5. Establish consensus on new process

4-33

Planning for Reengineering

Case Example:

Function: **Orient potential customers to available services.**

4-34

Identifying Collaboration Opportunities

- Review homework.
  - Who is the customer related to this function?

4-35

Identifying Collaboration Opportunities Continued

- Review information.
  - Current partners' products and services that are relevant to this function.
  - List one per card on cards color-coded for partner.
- Do affinity diagram to identify common products and services.

4-36

Identifying Collaboration Opportunities
Continued

- Review information.
  - Customer needs and expectations related to this function.
  - List one per card on cards color-coded for partner.
- Do affinity diagram to identify common customer needs and expectations.

4-37

Identifying Collaboration Opportunities
Continued

- Products/services and customer needs/expectations that have multiple funding source implications are potential areas for collaboration.
- Identify collaboration strategies that will meet partner agencies' needs and improve outcomes for customers.
  - A strategy is a statement to meet a need or overcome a challenge.

4-38

Identify What Process Will Do

- Review the list of potential strategies and brainstorm what you and your partners want the reengineered process to do.

4-39

Review the Current Process

- Take a look at the current process each individual partner uses to "orient potential customers to services available" to help show the "as is" capability.
- Conduct a process mapping exercise for this function.
  - See "Process Mapping" in the tools section of this module.

4-40

- List the major process steps in a spreadsheet format.
- List subtasks or decisions needed for each of the major steps.
- Ask team members questions along the way to help capture necessary steps.
  - *What really happens next?*
  - *Is there a decision needed before or after this task?*
  - *Are there approvals needed before or after this task?*
  - *Are we missing anything?*

4-41

Process Task Spreadsheet

Task #	Major Process Tasks	Subtasks/Decisions	Symbols
1	Staff gets inquiry from potential customer		
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3		Staff gives next step directions to individual	
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5		Staff provides information on services to individual	
6	Customer reviews information		

4-42

Review the Current Process
Continued

- Look at each line in the Process Task Spreadsheet and determine which flow chart symbol it would use.

4-43

Elongated Circle

Rectangle Box

Diamond

Connector

4-44

Document

Zigzag Arrow

Straight Arrow

4-45

Process Task Spreadsheet

Task #	Major Process Tasks	Subtasks/Decisions	Symbols
1	Staff gets inquiry from potential customer		
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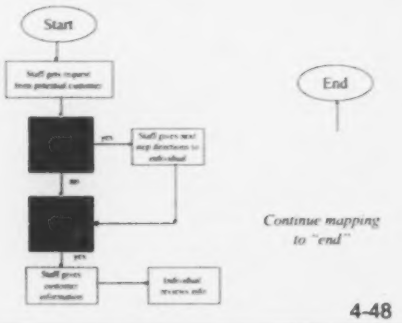
6	Customer reviews information		

4-46

Review the Current Process
Continued

- Create a process flow chart to visually see what you listed in the process task spreadsheet.

4-47



4-48

Review the Current Process
Continued

- Review the final "current process flow chart".
- With multi-partners doing independent work you will likely have several separate flow charts that may or may not intersect based on your current coordination or linkages.
- Discuss reengineering needs based on customer feedback.

4-49

Sketch New Process Alternatives

- Envision a desired state.
- If you could establish a process that would meet partner agencies' needs and improve customer outcomes, what would that look like?
- Forget current process now. Focus on what a new process might look like and what it could accomplish.

4-50

Establish Consensus on New Process

- Review reengineered process(es) and agree by consensus to move forward with ideas.

4-51

Redesign Customer Flow

- Based on new process flow chart(s), review customer flow.
- This redesign flow chart(s) will show only steps customers themselves must take to get to the desired outcome.

4-52

Service Delivery Roles

- Review process flowchart.
- Review redesigned customer flow.
- Present to partners for review.

4-53

Example of Reengineering Job Placement/Job Search

- Pewaukee, Wisconsin. Increase automated self-service options when little value added by staffed service.
  - *Old System* - ES staff took suppressed job orders from employers, used an automated job matching program, and referred job seekers registered with ES to employers.
  - *New System* - Automated job listings are directly accessible by job seeker customers. Staff are freed to provide more intensive services like counseling hard-to-place customers and offering employers individualized placement services (e.g. customized recruitment and screening).

4-54

Example of Reengineering Job Placement/Job Search

- Blaine, Minnesota. Improve the quality of job matching services by linking to information from local customer assessments.
  - Old System - Minnesota SkillsNet system is a statewide automated job information systems that can help One-Stop staff match the characteristics of current job seekers to the characteristics required in current job listings.
  - New System - In the Minnesota Workforce Center - Anoka County, a client assessment database shared by the center and vocational and technical colleges helps provide information on job seekers as input to the matching process.

4-55

Examples of Reengineering Job Placement/Job Search

- Baltimore, Maryland. Design a consistent approach to job placement services using a local interagency job placement design team
- Des Moines, Iowa. Consolidate the job placement function using a One-Stop job placement services team with staff from multiple partner agencies.
- Springfield, Massachusetts. Offer diverse job search workshops targeted to the needs of different customer groups: hourly and salaried workers.

4-56

Examples of Reengineering Job Placement/Job Search

- Provide job search training on an "as needed" basis through modular workshops.
- Offer a staffed job club as a core One-Stop service available to all customers.
- Offer staffed job search support services to all customers who are having difficulty finding a job.

4-57

General Principles for Reengineered Job Placement/Job Search

- Increase customer choices by offering diverse services targeted to customers with differing education and work experience, using different delivery modes and a number of short modules.
- Take advantage of automated tools where effective.

4-58

General Principles
Continued

- Figure out how to supplement automated services to help customers who need more assistance with staffed and individualized supports.
- Encourage customer initiative.
- Figure out where the customer is in the career development process and tailor service entry point to their needs.

4-59

General Principles
Continued

- Address both job seeker and employer customer needs.
- Build on the service capacity, staff expertise, and strength of current partners.
- Seek new partners or new funding streams to fill gaps.
- Add to richness and diversity of service options.

4-60

Using the Tools

- There are many functions that can be addressed in a unified way either through consolidation of functions, cross-staffing, and pooled funding; or through specialization in the service functions provided by different program partners and funding streams.

4-61

Using the Tools

- Apply the same tools to additional service functions.
  - Up-front services (eligibility, assessment, referral).
  - Post-placement training.
  - Career ladder/enhancing employment.
  - Automated information services.

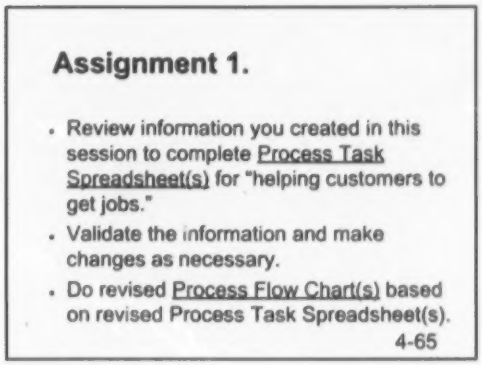
4-62

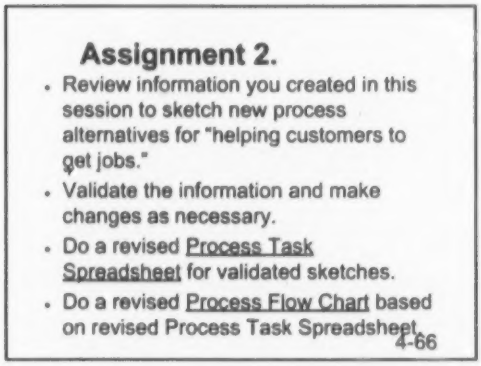
Using the Tools
Continued

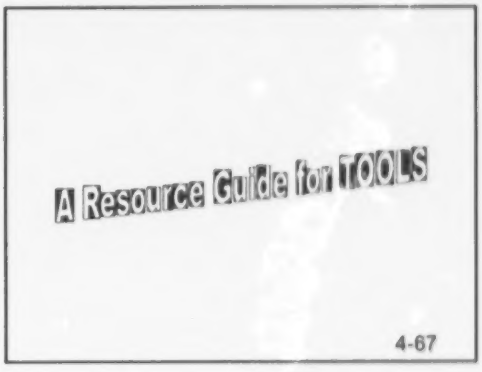
- Resource information areas.
- Group workshops.
- Staff support for customers needing assistance with self-service tools.
- Job information centers.

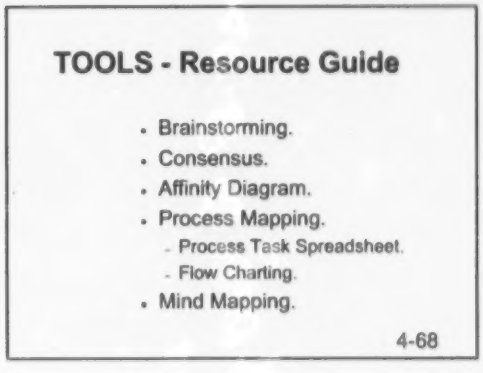
4-63

Homework Assignments
4-64


Assignment 1.
• Review information you created in this session to complete Process Task Spreadsheet(s) for "helping customers to get jobs."
• Validate the information and make changes as necessary.
• Do revised Process Flow Chart(s) based on revised Process Task Spreadsheet(s).
4-65


Assignment 2.
• Review information you created in this session to sketch new process alternatives for "helping customers to get jobs."
• Validate the information and make changes as necessary.
• Do a revised Process Task Spreadsheet for validated sketches.
• Do a revised Process Flow Chart based on revised Process Task Spreadsheet.
4-66


A Resource Guide for TOOLS
4-67


TOOLS - Resource Guide
• Brainstorming.
• Consensus.
• Affinity Diagram.
• Process Mapping.
- Process Task Spreadsheet.
- Flow Charting.
• Mind Mapping.
4-68

SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for
One-Stop System Building

Activity Worksheets

Module 4

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Menlo Park, CA 94025
Phone (650) 617-8625/Fax (650) 617-8630

Activity Worksheet 4-A
Agree on a Shared Service Terminology for Job Seeker Plus Services

Suggested Common List of Service Elements for Job-Seeker Plus Services	Your Version of a Common List of Service Elements
Application Assessment Basic Skills Testing Basic Skills Training Career Exploration Career Information Coaching and Customer Advocacy Computer Labs Customer Service Plans Customized Training Eligibility Focus Groups Individual Training Accounts Internships Job Clubs Job Fairs Job Leads Job Match Services Job Order Posting Job Search Assistance Labor Market Information Life Skills Training Literacy Training Occupational Aptitude Testing Occupational Training (Classroom) On-the-Job Training Orientation Post Placement Activities Pre-Employment Skills Training Reception/Greeting Referrals: Health and Social Services Referrals: Other Workforce Development Resource Library Summer Job Program Work Experience Other:	

Adapted from a Worksheet Developed by Mary Ann Lawrence
(317) 329-8418

Activity Worksheet 4-B
Agree on a Shared Service Terminology for Employer Services

Suggested Common List of Service Elements for Job-Seeker Plus Services	Your Version of a Common List of Service Elements
Applicant Screening Applicant Testing Services Work-Site Basic Skills/Literacy Training Brokering Tailored Training Services Customized Training Employer Resource Library Employer Seminars Employer Surveys/Focus Groups Information about Education/Training Resources Information about Government Progams Information about Labor Market Interviewing Services Job Matching Services Job Task Analysis Listing Job Openings Listing Resumes of Job Seekers Other: Other:	

Adapted from a Worksheet Developed by Mary Ann Lawrence
(317) 329-8418

Activity Worksheet 4-C
Service Mapping

Workforce Development Services for Employers

AGENCY NAME:			
CONTACT PERSON:	PHONE:	FAX:	EMAIL:

ACTIVITY	FUNDING SOURCE	ELIGIBILITY CRITERIA REQUIRED TO BE MET IN ORDER TO PARTICIPATE	INTENSITY (HOURS) OR DURATION (WEEKS)	DELIVERED TO GROUPS, INDIVIDUALS, OR BOTH
Applicant Screening				
Applicant Testing Services				
Work-Site Basic Skills/Literacy Training				
Brokering Tailored Training Services				
Customized Training				
Employer Resource Library				
Employer Seminars				
Employer Surveys/Focus Groups				
Information about Education/Training Resources				
Information about Government Progams				
Information about Labor Market				
Interviewing Services				
Job Matching Services				
Job Task Analysis				
Lising Job Openings				
Listing Resumes of Job Seekers				

Adapted from a Worksheet Developed by Mary Ann Lawrence
(317-329-8418)

Handout 4-C, Continued
Example of Employer Service Mapping
Completed by Big Ten Region, Colorado

EMPLOYER SERVICES

Colorado Division of Vocational Rehabilitation

Activity	Funding Source	Eligibility Criteria Required to Participate	Age Group	Notes:
Multi-Media Resource Library				
Job Match	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Listing of Job Openings	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Listing of Resumes	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Labor Market Information				
Occupational Growth Information				
Wage Rate Information				
Legal Assistance	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Interviewing Services				
Screening Services	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Testing Services	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Job Task Analysis	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Seminars	state/federal	employers must have info below* / DVR elig clients	adult/youth	services vary between cities
Other:				

*employers must have W-9 taxpayer id, payroll system, workman's comp, and pay above minimum wage.

Activity Worksheet 4-D
Service Mapping
Workforce Development Services for Job Seekers Plus

AGENCY NAME:			
CONTACT PERSON:	PHONE:	FAX:	EMAIL:

ACTIVITY	FUNDING SOURCE	ELIGIBILITY CRITERIA REQUIRED TO BE MET IN ORDER TO PARTICIPATE	INTENSITY (HOURS) OR DURATION (WEEKS)	DELIVERED TO GROUPS, INDIVIDUALS, OR BOTH
Application				
Assessment				
Basic Skills Testing				
Basic Skills Training				
Career Exploration				
Career Information				
Coaching and Customer Advocacy				
Computer Labs				
Customer Service Plans				
Customized Training				
Eligibility				
Focus Groups				
Individual Training Accounts				
Internships				
Job Clubs				
Job Fairs				
Job Leads				
Job Match Services				

Adapted from a Worksheet Developed by Mary Ann Lawrence
(317-329-8418)

Activity Worksheet 4-D
Service Mapping

Job Order Posting				
Job Search Assistance				
Labor Market Information				
Life Skills Training				
Literacy Training				
Occupational Aptitude Testing				
Occupational Training (Classroom)				
On-the-Job Training				
Orientation				
Post Placement Activities				
Pre-Employment Skills Training				
Reception/Greeting				
Referrals: Health and Social Services				
Referrals: Other Workforce Development				
Resource Library				
Summer Job Program				
Work Experience				
Other:				
Other:				
Other:				
Other:				
Other:				
Other:				

Adapted from a Worksheet Developed by Mary Ann Lawrence
(317-329-8418)

Handout 4-D, Continued
Example of Job Seeker Service Mapping
Completed by Big Ten Region, Colorado

JOB SEEKER SERVICES PLUS

Colorado Division of Vocational Rehabilitation

Note: purchases and/or provides these. . .

L = Limon
FM = Fort Morgan

Activity	Funding Source	Eligibility Criteria Required to Participate	Age Group	Notes:
Application	state/federal	physical/mental impairment	adults/youth	L/FM
Assessment	state/federal	physical/mental impairment	adults/youth	psych/med/voc L/FM
Basic Skills Testing	state/federal	physical/mental impairment	adults/youth	
Basic Skills Training	state/federal	physical/mental impairment	adults/youth	
Career Exploration	state/federal	physical/mental impairment	adults/youth	
Career Information	state/federal	physical/mental impairment	adults/youth	
Coaching	state/federal	physical/mental impairment	adults/youth	
Computer Labs	state/federal	physical/mental impairment	adults/youth	
Customer Service Plans	state/federal	physical/mental impairment	adults/youth	
Customized Training	state/federal	physical/mental impairment	adults/youth	
Eligibility	state/federal	physical/mental impairment	adults/youth	
Focus Groups				
Individual Training Accounts	yes/case file #	yes/case file #	yes/case file #	
Internships	yes	yes	yes	
Job Clubs	yes	yes	yes	
Job Fairs				
Job Leads	yes	yes	yes	
Job Match Services				
Job Order Posting				
Job Search Assistance	yes	yes	yes	
Labor Market Information				
Life Skills Training	yes	yes	yes	
Literacy Training	yes	yes	yes	
Occupational Aptitude Testing	yes	yes	yes	
On-the-Job Training	yes	yes	yes	
Orientation	yes	yes	yes	
Post Placement Activities	yes	yes	yes	
Pre-Employment Skills Training	yes	yes	yes	
Referrals	yes	yes	yes	
Resource Library	yes	yes	yes	
Summer Job Program				
Work Experience	yes	yes	yes	
Other:	yes	yes	yes	

Handout 4-E

Sample Format for Crosswalk of Employer Services by Agency

EMPLOYER SERVICES

Activity → / Agency ↓	Applicant Screening	Applicant Testing	Job Site Basic Skills	Customized Training	Employer Resource Library	Employer Seminars	Employer Focus Groups
Agency A							
Agency B							
Agency C							
Agency D							
Agency E							
Agency F							
Agency G							
Agency H							
Agency I							
Agency J							
Agency K							
Agency L							
Agency M							
Agency N							
Agency O							

This is part of a report prepared by Mary Ann Lawrence as part of training conducted for this local area.

Handout 4-E
Continued
Example of Crosswalk of Employer Services
Developed by Big Ten Region, Colorado

EMPLOYER SERVICES

Agency ↓ / Activity →	Colorado First	Customized Training	Training Development	Employer Surveys	Interviewing Services	Job Match	Job Task Analysis
Colorado Division of Vocational Rehabilitation						x	x
Eastern Colorado Workforce Center					x	x	x
Family Education Services							
Green Thumb					x	x	
Job Corps					x	x	x
Logan Cty Chamber of Commerce						x	
Logan County Literacy Coalition							
Logan County Social Services/Social							
	x	x	x		x		x
							x
				x		x	
					x		

Handout 4-F

JOB SEEKER SERVICES PLUS

Sample Format for Crosswalk of Job Seeker Plus Services by Agency

Activity → / Agency ↓	Application	Assessment	Basic Skills Training	Basic Skills Testing	Career Exploration	Career Information	Case Management
Agency A							
Agency B							
Agency C							
Agency D							
Agency E							
Agency F							
Agency G							
Agency H							
Agency I							
Agency J							
Agency K							
Agency L							
Agency M							
Agency N							
Agency O							
Agency P							

This is part of a report prepared by Mary Ann Lawrence as part of training conducted for this local area.

Handout 4-F
Continued
Example of Crosswalk of Job Seeker Plus Services
Developed by Big Ten Region, Colorado

JOB SEEKER SERVICES PLUS

Activity → / Agency ↓	Application	Assessment	Basic Skills Training	Basic Skills Testing	Career Exploration	Career Information	Case Management
Colorado Division of Vocational Rehabilitation	x	x	x	x	x	x	
Eastern Colorado Workforce Center	x	x	x	x	x	x	x
Family Education Services	x	x	x	x			
Green Thumb	x	x			x	x	
Job Corps	x	x	x	x	x	x	
Logan Cty Chamber of Commerce	x	x					
Logan County Literacy Coalition		x	x	x			
Logan County Social Services/Social							
[redacted]	x	x	x	x	x	x	
	x	x	x	x	x	x	
	x	x	x	x	x	x	
	x						
	x			x	x	x	
	x						
					x	x	

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SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Case Studies

Module 4

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CASE STUDY EXAMPLE
MODULE 4. REDESIGNING A SYSTEM FOR INTEGRATED SERVICE DELIVERY

NORTHWEST *MICHIGAN WORKS!*

Background

Northwest Michigan is a ten-county area, very large in geographic scope (about the size of Connecticut), with a population of approximately 275,000. There are four primary population centers (small cities) with many small towns and villages. Major labor market categories are agriculture, small manufacturing, tourism, and services.

Historically, all programs and agencies were delivered separately and categorically. There was no co-location and services were very fragmented. However, the region had a solid history of cooperation between service providers. One-Stop efforts began in the mid-1980s, stopped for a couple years, and started again in earnest in 1991, prior to any real national movement. The Northwest Michigan area was one of the ten "Job Training 2000" demonstration sites under the Bush administration, and one of the ten "One Stop Local Learning Labs" under the Clinton administration.

Currently there are eight one-stop centers in the region: four main centers and four smaller satellite centers. All services are integrated for ease of customer service (see Attachment). Participating programs/agencies include: all JTPA programs; Employment Service; Unemployment Insurance; all welfare-to-work programs; school-to-work; Rehabilitation Services; adult basic education; Trade Adjustment Assistance programs; Senior Community Service and Older Workers Program; veterans services; migrant/seasonal farm workers services; customized business & industry training; government procurement technical assistance; and a micro-enterprise development program.

Integration Process

Under the leadership of the Private Industry Council (now the Workforce Development Board), a planning and advisory committee was formed to design the integrated service system. It consisted of managers and leaders from all potential partners.

The committee spent many months creating a vision of an integrated system. Each partner wanted to retain its separate administrative identity, but it was finally agreed that the system should be "seamless" to the customer. Many different ideas and design options were brainstormed and explored. Focus groups of job seekers and employers were used to help get the customers' perspective, and this played the biggest part in helping partners get past their special interests.

Many philosophical agreements were reached to support the creation of a new vision, and a great deal of training was used to stabilize the philosophical changes and the vision. Perhaps the most important agreements were: (1) start from scratch rather than simply making adjustments in current practices; (2) look at every decision and feature from the customers' perspective; and (3) utilize each program/agency for its highest and best use. An "ultimate goal" and enabling objectives were written and adopted. These solidified the foundation of the planning process. Later, more formal Mission, Objectives, and Guiding Principles were established.

A consensus process was used throughout two years of planning. This was not a "linear" process; there were many sidetracks, problems, adjustments, and compromises along the way. Use of charts, pictures and diagrams helped everyone reach agreement better than word descriptions and meeting minutes (all of which could be interpreted different ways based on frame of reference). Work groups made up of committee members and numerous staff people were used to design various aspects of the system (examples: integrated employer services; technology support; confidentiality; staff training; unified outcome measurement; marketing; etc.) Flowcharting of services played a major part in designing the system. Program names and agency names were not used in the flowcharts; instead, the partners agreed to use descriptive names of *services*—words that would have meaning to customers.

After several variations of an ideal service flowchart had been attempted, the partners finally settled on an inverted pyramid—a very different kind of "flowchart." (See Attachment.) The next step was to "plug" each program/partner and its staff into the mix. The committee asked itself which program(s) could do each piece best, most efficiently, with the most flexibility. A conscious decision was made to honor each partner's strengths rather than focus on its weaknesses. The desired effect was a system where the whole was greater than the sum of the parts. Some programs/partners would act as generalists, other would be specialists, and some would do both in various ways. These contributions were all mapped out on a grid.

The locations of the centers were determined by analyzing the following: demographic data, commuting patterns, health care and retail centers, educational and agency facilities, and geographic barriers (lots of lakes in the way!). A name for the new system was selected and it was agreed all would focus on this name through unified marketing, rather than individual partner names. (Later, as the entire state moved to a one-stop system, a statewide *Michigan Works!* identity was adopted.)

A technology system was designed and put into place to support integrated operations. This has changed over the years as the system has been refined and technology options have increased.

The integrated service system has been in place since 1993 and is ever dynamic. Many changes have taken place in Michigan and locally since then, so the system continues to refine itself. Customer feedback is used extensively to improve services and facilities. The system is managed collaboratively through a Partners' Management Team that meets monthly, and site-based management teams that handle daily operations.

Northwest *Michigan Works!* and the Northwest Michigan Council of Governments (the administrative entity for the Workforce Development Board) offer extensive and customized training on creating an integrated workforce development system, based on their experiences.

For more information, contact:

Elaine Wood
Northwest Michigan Council of Governments
P.O. Box 506
Traverse City, Michigan 49685-0506
(616) 929-5000
ewood@nwm.cog.mi.us

(Case Study Completed January 1999)

NOTES ON THE NORTHWEST *MICHIGAN WORKS!* SERVICE FLOWCHART:

- Customer entry may be at any point. However, most customers enter at the core services, via a claim for Unemployment Insurance or a registration in the Employment Service (labor exchange). Others enter via a referral from the welfare agency and actually start in the Enhanced Services portion of the chart. A dislocated worker might enter through a Rapid Response meeting at his company and would therefore begin enhanced services immediately. There are many variations and examples. Movement goes both directions throughout the pyramid, and every customer's use of the system is unique.

- The major premise of this flowchart is that the most widely used, least staff-intensive, and least expensive services are in the top layer. Based on need, some customers work their way into other layers of more intensive, more specialized services. .

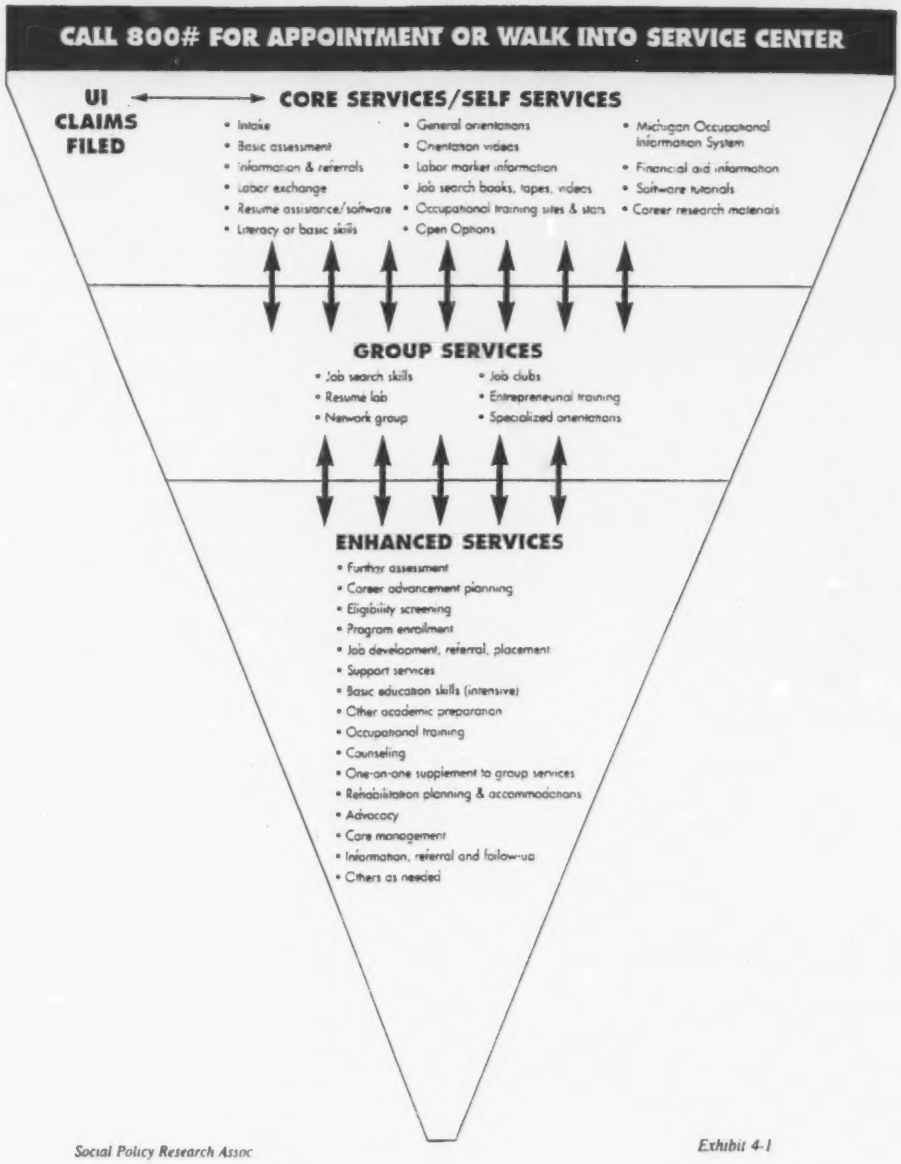
- Note that there are no program or partner names on the flowchart. Each partner provides one or more portions of these services. For example: Michigan Rehabilitation Services provides primarily certain enhanced services for disabled customers; JTPA Title IIA provides some aspects of core, group and enhanced services for economically disadvantaged adults; Employment Service provides strictly one aspect of core services for all customers.

- This flowchart was created a few years before passage of the Workforce Investment Act. WIA also speaks to "layers" of service, becoming more intensive as needed. This is very similar to the Northwest *Michigan Works!* model. No major changes are anticipated in the transition to WIA; however, some labels on the chart might be changed, and some of the enhanced services may be moved up to the middle layer.

Northwest MICHIGAN WORKS!

Exhibit 4-1 Module 4.

Operations Flowchart



Social Policy Research Assoc

Exhibit 4-1

BEST COPY AVAILABLE